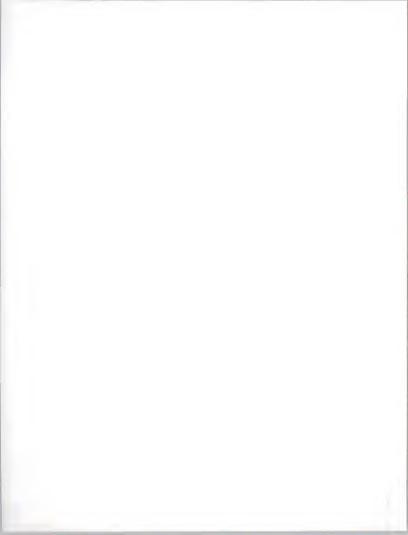
INPUT Presentations

Paris 20 October 1992









IT Spending Patterns Europe, 1992

- · Changing user demands
- Impact on software and services vendors
- · User spending expectations

E-IS-52

INPUT

10/14/92



Software and Services

Key user demands

- Value for money
- Cost reduction
- Effectiveness

E-IS-43

INPUT

Notes	

3/28/92



Software and Services

Getting value for money from IT

- · User ownership
- · Benefits to business
- Productivity improvement
- Essential to infrastructure

5-44

INPUT

Notes	



Software and Services

Seeking cost reduction for IT

- Downsizing
- Outsourcing
- 80% solutions

E-IS-45

INPUT

Notes		

8/28/92



Software and Services

Improving effectiveness from IT

- Business process re-engineering
- Simplification
- Speed of implementation
- Flexibility

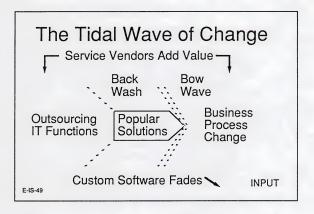
E-IS-46

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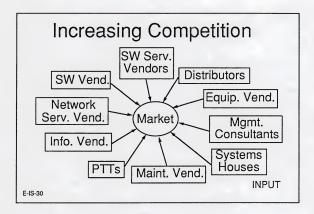
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Software and Services-Europe, 1991

Changing Market Shares

	(Perd	cent)
Vendor's Business	1981	1991
Professional Services	18	38
Management Consultancy	3	7
Software Products	9	13
Processing/Networks	31	3
E-IS-47		INPUT

Notes	
R/28qp	



Software and Services—Europe, 1991

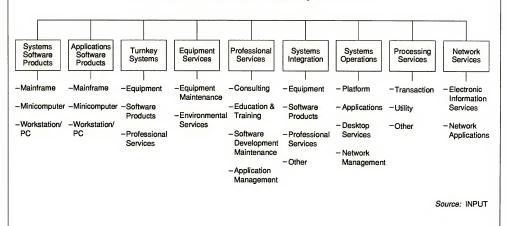
Changing Market Shares

		(Perd	cent)
	Vendor's Business	1981	1991
	Equipment Vendor	39	35
	Maintenance	0	2
	Distribution	0	1
	Telecommunications	0	1
E-IS-4	8		INPUT

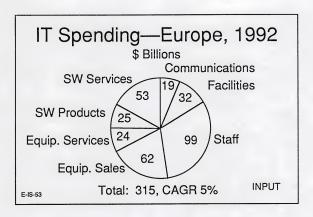
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Information Services Industry Structure







Notes	

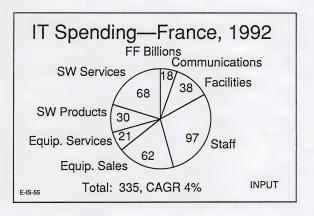


IT Spending—Europe, 1992

	CAGR (%)	
Communications	8	
Facilities	1	
Staff	3	
Equipment Sales	2	
Equipment Services	3	
Software Products	11	
Software Services	11 INPUT	
	INFUI	

Notes		





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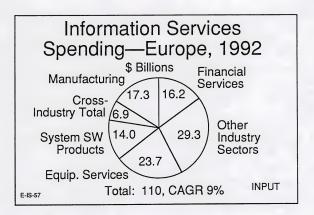


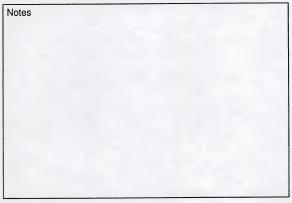
IT Spending—France, 1992

		CAGR (%)	
	Communications	6	
	Facilities	1	
	Staff	1	
	Equipment Sales	1	
	Equipment Services	2	
	Software Products	10	
	Software Services	11	INPUT
E-IS-56			INPUT

Notes







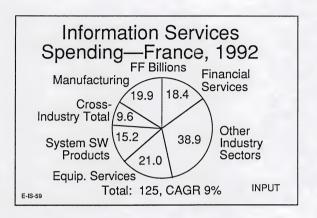


Information Services Spending—Europe, 1992

	CAGR (%)
Manufacturing	11
Financial Services	11
Other Industry Sectors	11
Equipment Services	3
System Software Products	7
Cross-Industry Total	12 INPUT
E-IS-58	1141 01

Notes	





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Information Services Spending—France, 1992

Manufacturing 10
Financial Services 11
Other Industry Sectors 11
Equipment Services 2
System Software Products 7
Cross-Industry Total 13
INPUT

Notes			



